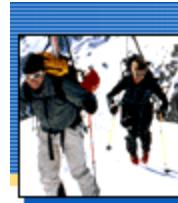




U.S. Army 2005 MWR Leisure Needs Survey



**Fort Belvoir
Virginia**

CALIBER
an ICF Consulting Company

BRIEFING OUTLINE

Fort Belvoir

□ LEISURE NEEDS SURVEY

- Project Overview
- Methodology
- Patron Sample
- Products

□ SURVEY RESULTS

- MWR Programs and Facilities
- Army Community Service
- Child and Youth Services
- Better Opportunities for Single Soldiers
- Leisure Activities
- Deployment and MWR
- Career Intentions

□ NEXT STEPS

PROJECT OVERVIEW

Fort Belvoir

MWR STRATEGIC BUSINESS PLANNING MODEL

COMPONENTS

Analyzing and forecasting the external environment

Analyzing programs and markets

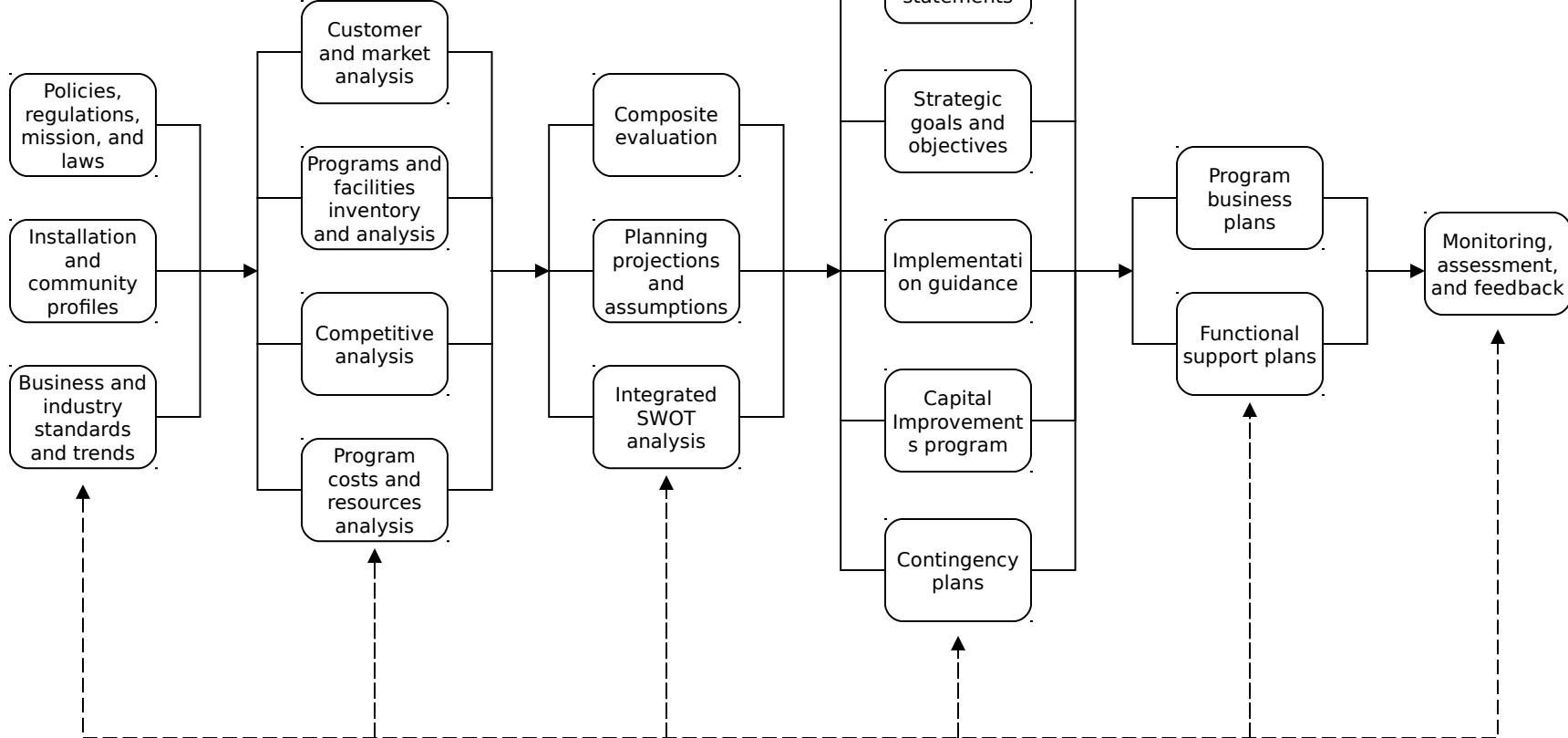
Developing alternatives

Formulating the strategic business plan

Formulating operational business plans

Monitoring and evaluating plan implementation

ELEMENTS



METHODOLOGY

Fort Belvoir

□ PROJECT SCOPE

- 92 sites were surveyed in 2005
 - Northeast (21 sites)
 - Northwest (10 sites)
 - Southeast (13 sites)
 - Southwest (14 sites)
 - Europe (20 sites)
 - Korea (9 sites)
 - Pacific (5 sites)
- 249,555 surveys were distributed throughout the Army to 4 patron groups:
 - Active Duty Soldiers
 - Spouses of Active Duty Soldiers (CONUS only)
 - DA Civilians
 - Retirees (CONUS only)
- 4,819 surveys were distributed at Fort Belvoir



□ SURVEY ADMINISTRATION

- Designed to collect information on installation MWR programs and facilities as well as the leisure activities of your potential market
- 65 multiple choice questions; 7 questions were tailored to your specific installation issues

METHODOLOGY

Fort Belvoir

□ **SURVEY ADMINISTRATION (Continued)**

- Active Duty and DA Civilian surveys distributed by installation POCs
- Spouses of Active Duty and Retiree surveys direct mailed to home addresses (CONUS only)
- Web survey option offered for the first time to all respondents

METHODOLOGY

Fort Belvoir

I SURVEY SAMPLE

- Four population segments
 - Active Duty
 - Spouses of Active Duty (CONUS only)
 - Civilian Employees
 - Retirees (CONUS only)
- Response Rates and Confidence Intervals for each patron group and overall sample

	<u>Survey Population</u>	<u>Surveys Distributed</u>	<u>Surveys Returned</u>	<u>Response Rate</u> *	<u>Confidence Interval</u> **
Army:					
Survey Totals	1,212,240	249,555	50,651	20.91%	± .43%
Ft. Belvoir:					
Active Duty	5,093	1,194	160	13.40%	± 7.62%
Spouses of Active Duty	5,852	1,484	200	13.48%	± 6.81%
Civilian Employees	6,529	934	86	9.21%	± 10.50%
Retirees	14,945	1,207	260	21.54%	± 6.02%
Total	32,419	4,819	706	14.65%	± 3.65%

* Response rate is calculated by dividing the number of surveys returned by the number of surveys distributed. It should be noted that low response rates (i.e., less than 20%) increase the chance that one or more subgroups (e.g., for active duty patron group, E1-E4 is a subgroup) may be over- or under-represented. Any patron groups with fewer than 15 survey respondents do not have their data reported to protect privacy and ensure representativeness.

**A confidence interval for a sample mean tells us the range in which we are likely to find the true population mean: Assume 300 surveys were returned for an active duty patron group of 1,350. 52% responded that they used the gym in the last year. The 95% confidence interval for this case would be ±5%. Thus there is a 95% chance that the TOTAL number of active duty at this installation who used the gym last year is between 47% and 57%. We can be 95% confident that between 634 and 770 active duty used the gym.

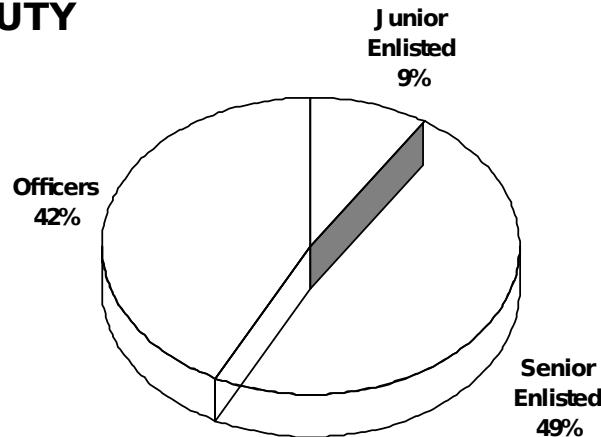
PATRON SAMPLE*

Fort Belvoir

RESPONDENT POPULATION SEGMENTS

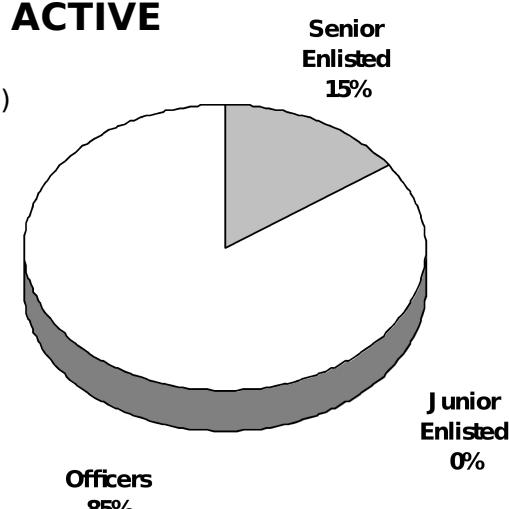
ACTIVE DUTY

(n = 153)



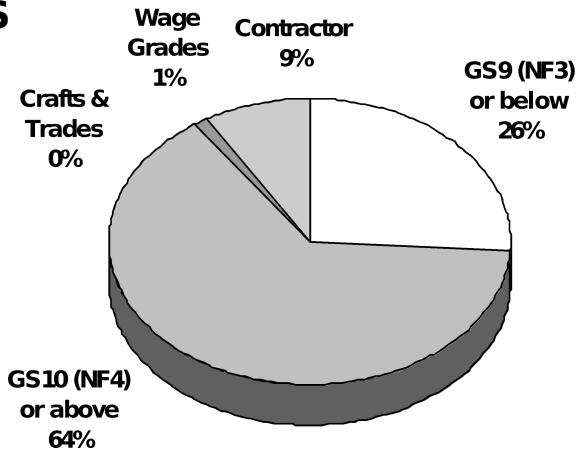
SPOUSES OF ACTIVE DUTY

(n = 175)



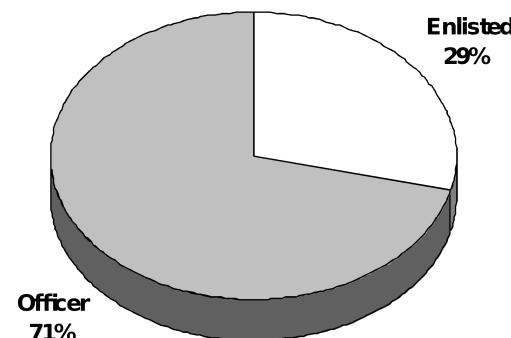
CIVILIANS

(n = 85)



RETIREES

(n = 205)



*The n provided for each patron group is equal to the number of respondents who provided their rank or paygrade.

PRODUCTS

Fort Belvoir

□ **PRODUCTS**

- Comprehensive installation report of survey data in electronic form
- SPSS data file provided to installation representatives for further analyses, if desired
- Installation level briefing of findings
- IMA and Army level roll-up reports and briefings

□ **PRODUCT DISTRIBUTION**

- All products provided on CD
- CD distribution to installation MWR Directors, IMA Headquarters, and U.S. Army Community and Family Support Center

MWR PROGRAMS & FACILITIES: USAGE AT FORT BELVOIR

Fort Belvoir

MOST FREQUENTLY USED FACILITIES

Fitness Center/Gymnasium	31%
Golf Course Food & Beverage	26%
ITR – Commercial Travel Agency	22%
Bowling Food & Beverage	21%
Bowling Center	21%

LEAST FREQUENTLY USED FACILITIES

School Age Services	3%
Youth Center	3%
BOSS	3%
Child Development Center	4%
Marinas	4%

MWR PROGRAMS & FACILITIES: SATISFACTION AT FORT BELVOIR*

Fort Belvoir

FACILITIES WITH HIGHEST SATISFACTION RATINGS*

Golf Course Food & Beverage	4.39
Bowling Pro Shop	4.38
ITR - Commercial Travel Agency	4.37
Golf Course Pro Shop	4.35
Golf Course	4.31

FACILITIES WITH LOWEST SATISFACTION RATINGS*

Marinas	3.85
BOSS	3.92
Post Picnic Area	3.99
Recreation/Community Activity Ctr.	
4.14	
Bowling Food & Beverage	4.14

*Programs and facilities were rated on a 5 point scale: 5 = Very Satisfied and 1 = Very Dissatisfied

MWR PROGRAMS & FACILITIES: QUALITY AT FORT BELVOIR*

Fort Belvoir

FACILITIES WITH HIGHEST QUALITY RATINGS*

Golf Course Pro Shop	4.38
Golf Course	4.27
Bowling Pro Shop	4.33
Golf Course Food & Beverage	4.33
School Age Services	4.27

FACILITIES WITH LOWEST QUALITY RATINGS*

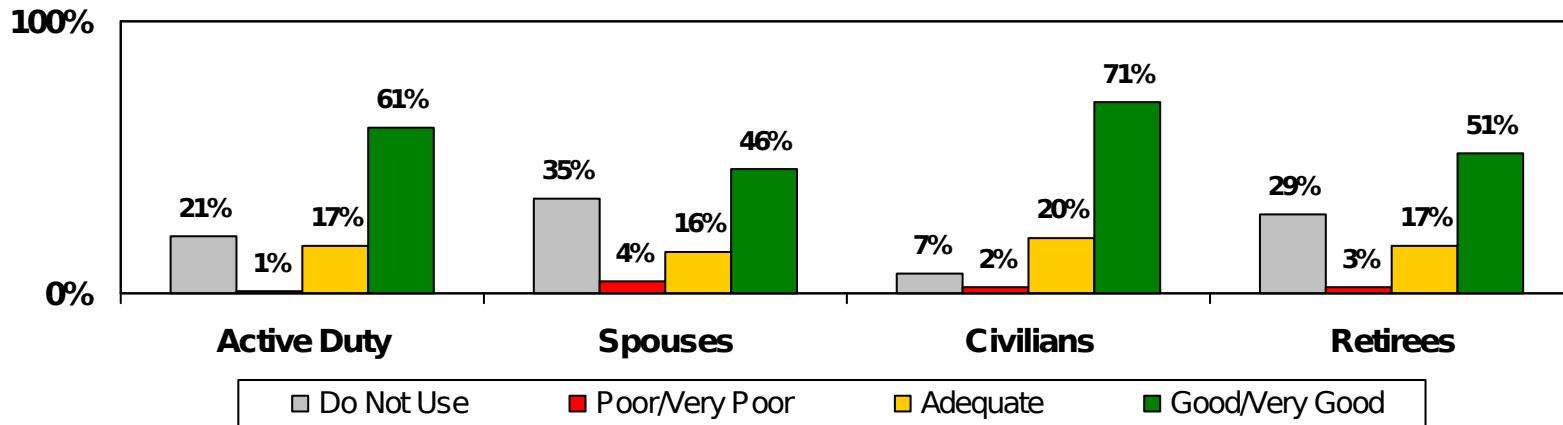
Marinas	3.44
BOSS	3.85
Post Picnic Area	3.92
Library	3.93
Athletic Fields	3.95

*Programs and facilities were rated on a 5 point scale: 5 = Very Good and 1 = Very Poor. These ratings are an average of three quality scores: Building/Facility/Space, Equipment/Furnishings, and Personnel.

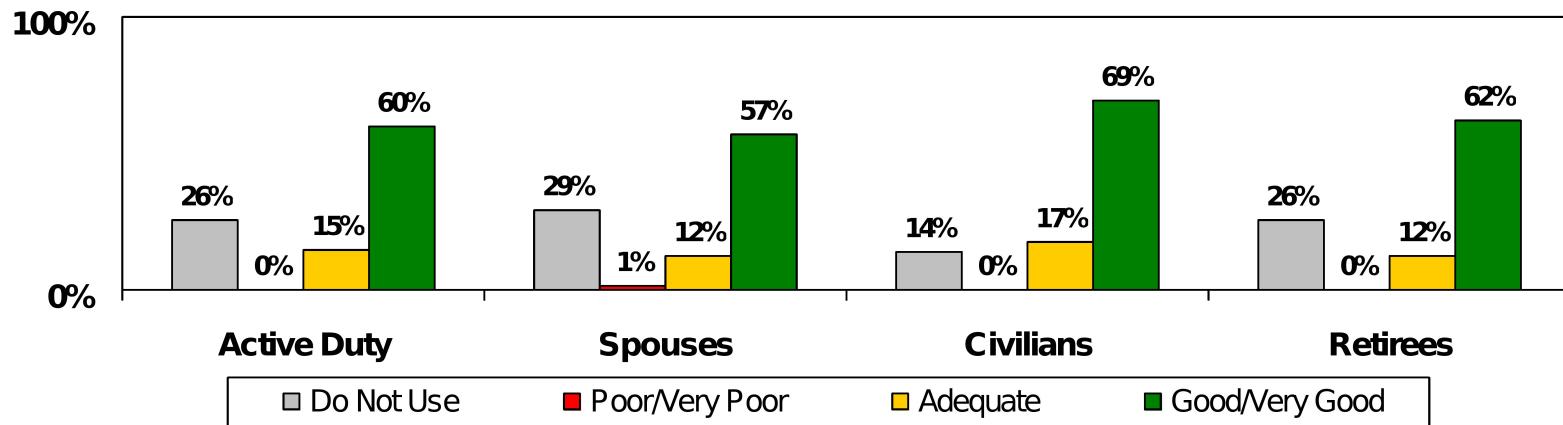
MWR PROGRAMS & FACILITIES: FOOD AND BEVERAGE SERVICES QUALITY

Fort Belvoir

Quality of On-Post Services



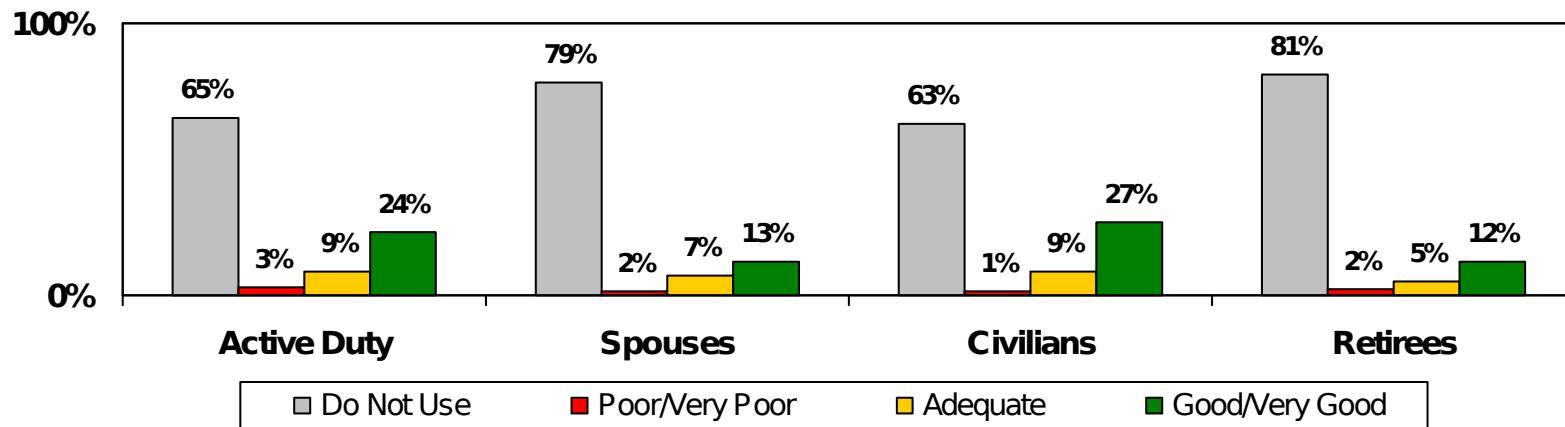
Quality of Off-Post Services



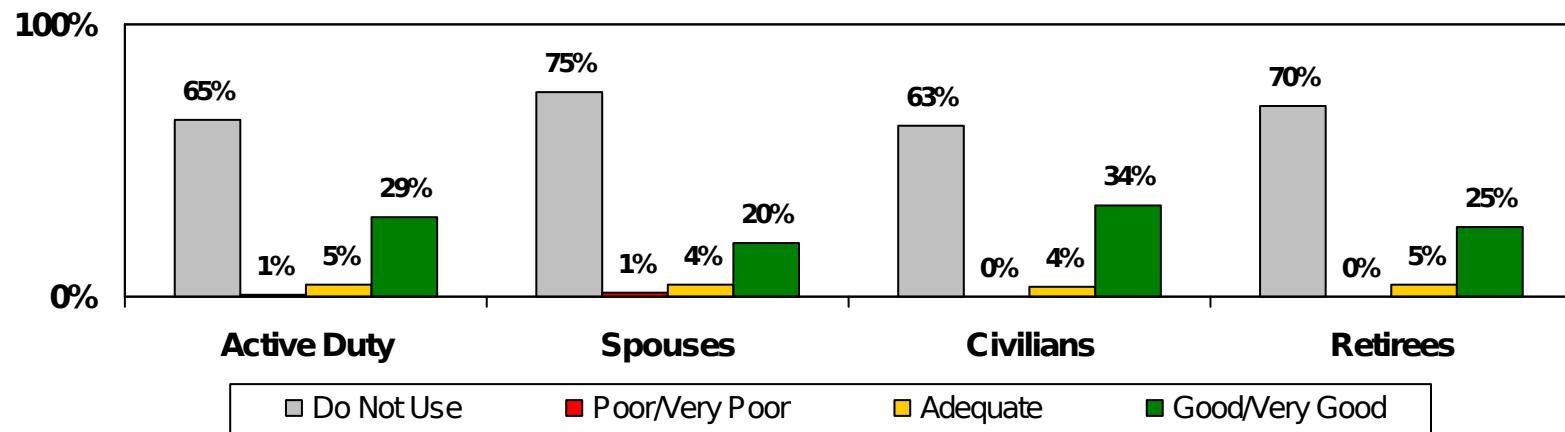
MWR PROGRAMS & FACILITIES: CATERING SERVICES QUALITY

Fort Belvoir

Quality of On-Post Services



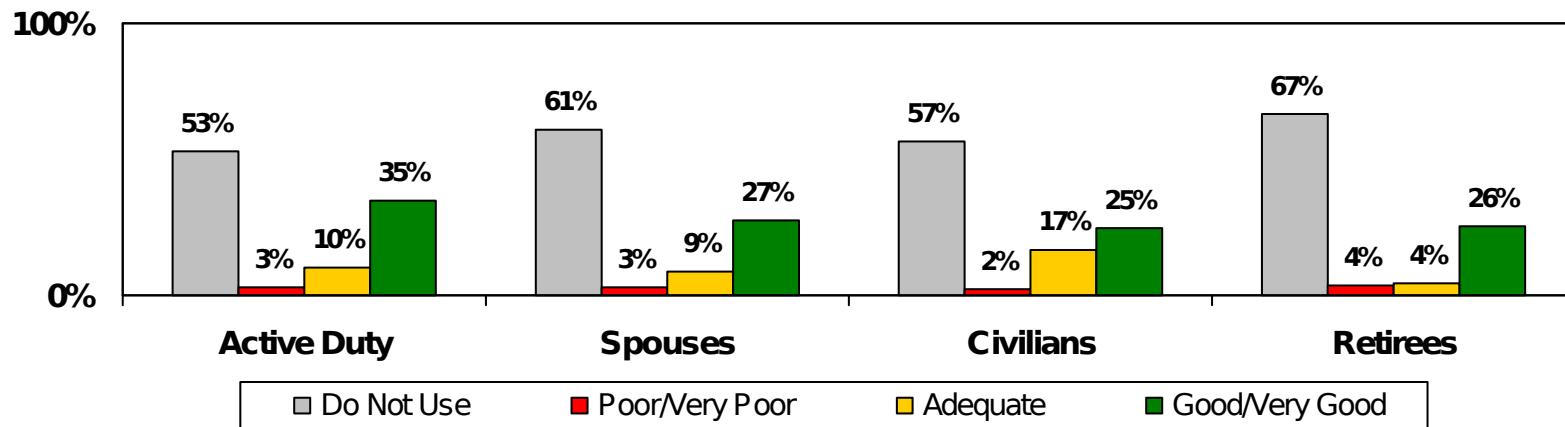
Quality of Off-Post Services



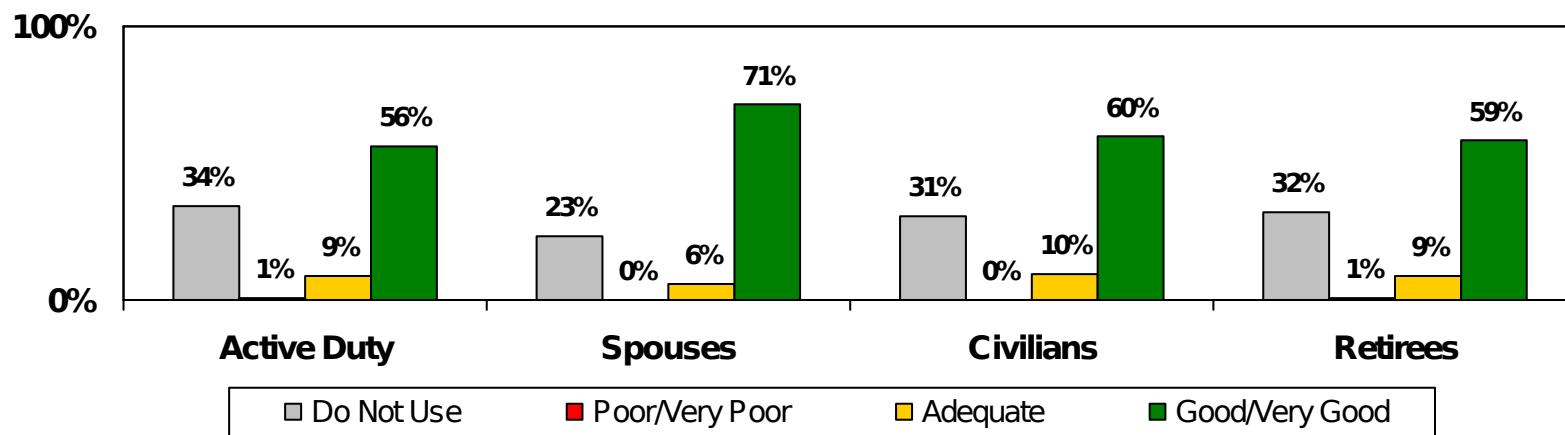
MWR PROGRAMS & FACILITIES: ENTERTAINMENT SERVICES QUALITY

Fort Belvoir

Quality of On-Post Services

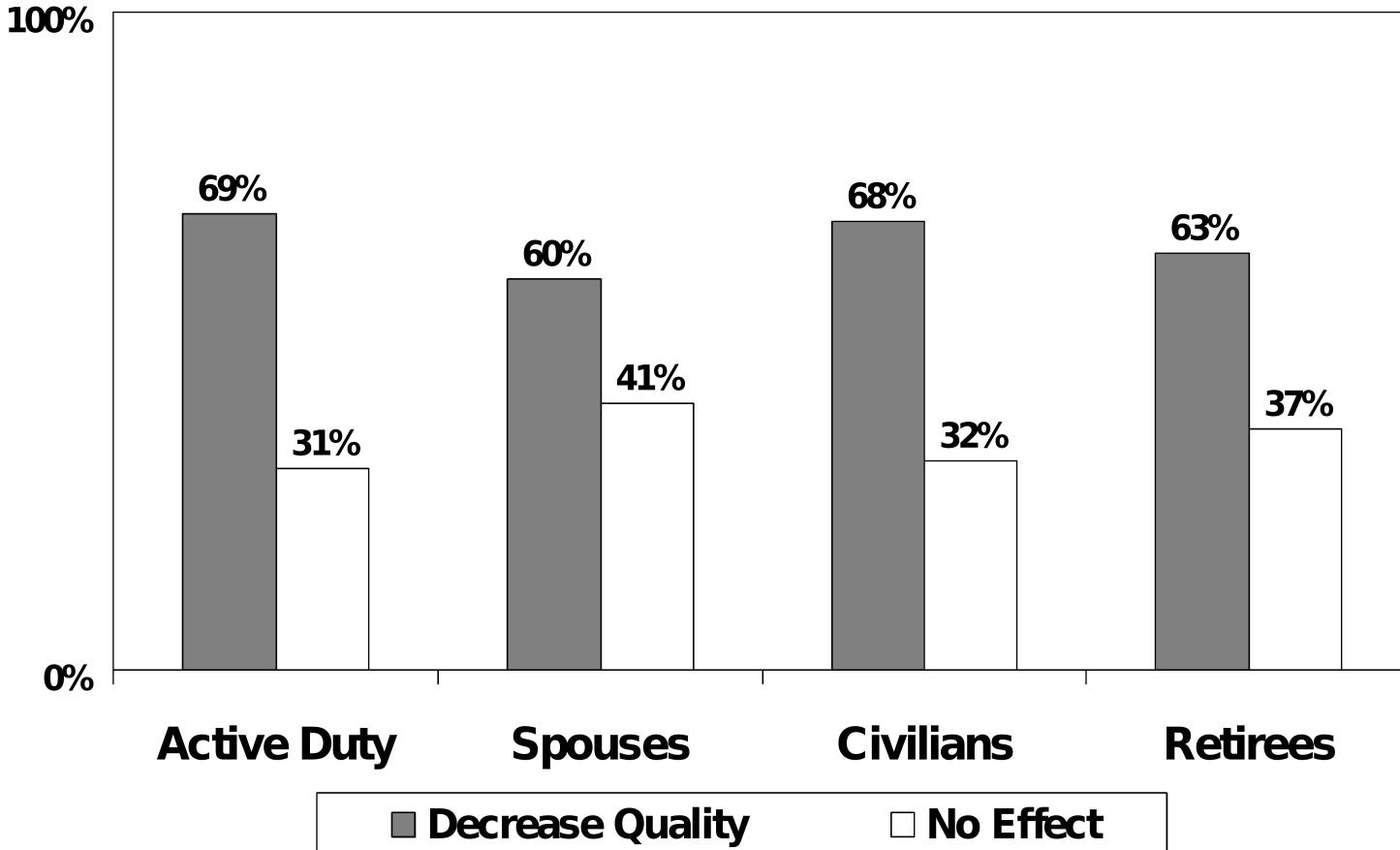


Quality of Off-Post Services



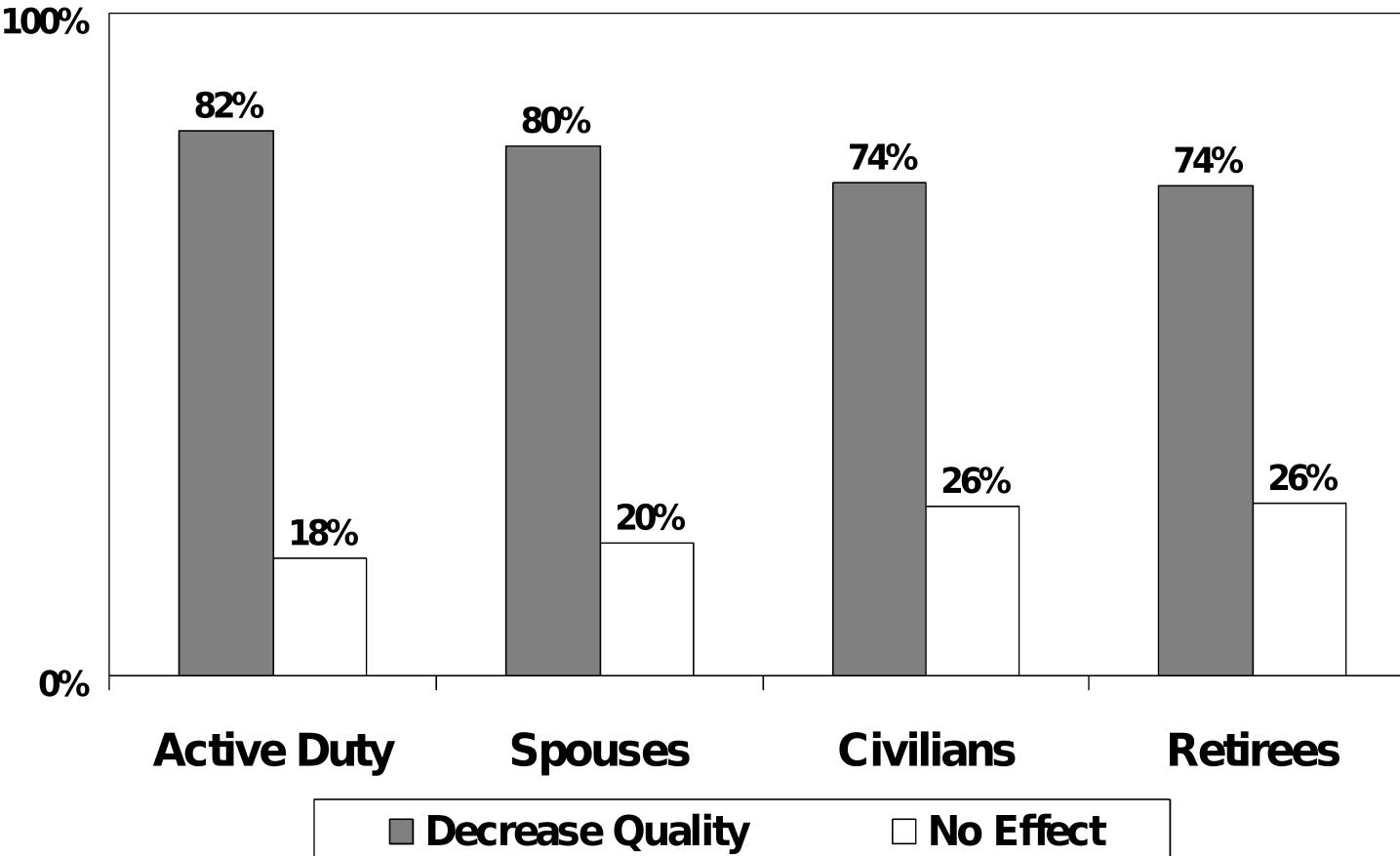
MWR PROGRAMS & FACILITIES: CLUB PROGRAM ELIMINATION EFFECT ON ARMY QOL

Fort Belvoir



MWR PROGRAMS & FACILITIES: RECREATION PROGRAM ELIMINATION EFFECT ON ARMY QOL

Fort Belvoir



MWR PROGRAMS & SERVICES: MOST AND LEAST IMPORTANT ACTIVITIES/PROGRAMS

Fort Belvoir

Top 7 Activities/Programs

Fitness Center/Gymnasium	75%
Army Lodging	75%
Library	53%
Child Development Center	53%
Youth Center	48%
Swimming Pool	41%
ITR Office	39%

Respondents were asked to select the 7 most important and 7 least important activities and programs offered on an Army installation.

RV Park	78%
Bowling Pro Shop	55%
Car Wash	53%
Golf Course Pro Shop	51%
Cabins % Campgrounds	50%
Golf Course Food & Beverage	41%
Marina	38%

Bottom 7 Activities/Programs

MWR PROGRAMS & SERVICES: SOURCES OF INFORMATION*

Fort Belvoir

WHERE DO YOU GET INFORMATION?	ACTIVE DUTY	SPOUSES	CIVILIANS	RETIREEES	TOTAL
Internet	24%	18%	36%	16%	22%
E-mail	32%	8%	46%	12%	22%
Friends and neighbors	25%	22%	31%	25%	26%
Family Readiness Groups (FRGs)	6%	5%	2%	1%	3%
Bulletin boards on post	33%	17%	29%	16%	22%
Post newspaper	56%	42%	60%	51%	52%
MWR publications	32%	21%	48%	37%	36%
Radio	0%	1%	1%	1%	1%
Television	1%	2%	2%	2%	2%
My child(ren) let(s) me know	5%	1%	0%	0%	1%
Other unit members or co-workers	28%	8%	36%	9%	17%
Unit or post commander or supervisor	18%	4%	7%	2%	6%
Marquees/billboards	11%	12%	12%	10%	11%
Flyers	28%	20%	47%	31%	32%
Other	8%	11%	8%	14%	11%
I never hear anything	6%	25%	4%	14%	12%

*The top 3 sources of MWR information are shaded for each patron group and the total population.

MWR PROGRAMS/SERVICES: GENERATE FEELING THAT THE ARMY CARES ABOUT ITS PEOPLE*

Fort Belvoir

MWR PROGRAM/SERVICE	ACTIVE DUTY	SPOUSES OF ACTIVE DUTY
Army Child and Youth Services	96%	93%
Better Opportunities for Single Soldiers	48%	N/A
Army Community Service	64%	68%
MWR Programs and Services	83%	86%

* Positive = moderate, great or very great extent

ARMY COMMUNITY SERVICE: AWARENESS AND BENEFIT - ACTIVE DUTY

Fort Belvoir

ACS PROGRAMS	AWARENESS	BENEFICIAL*	NOT BENEFICIAL*
Information and Referral	57%	91%	9%
Outreach programs	53%	77%	23%
Family Readiness Groups	68%	85%	15%
Relocation Readiness Program	72%	93%	7%
Family Advocacy Program	68%	85%	15%
Crisis intervention	48%	84%	16%
Money management classes, budgeting assistance	63%	93%	7%
Financial counseling, including tax assistance	70%	92%	8%
Consumer information	37%	94%	6%
Employment Readiness Program	56%	79%	21%
Foster child care	29%	79%	21%
Exceptional Family Member Program	66%	91%	9%
Army Family Team Building	58%	81%	19%
Army Family Action Plan	49%	82%	18%

* Percentage of Active Duty users

ARMY COMMUNITY SERVICE: AWARENESS AND BENEFIT - SPOUSES

Fort Belvoir

ACS PROGRAMS	AWARENESS	BENEFICIAL*	NOT BENEFICIAL*
Information and Referral	56%	97%	3%
Outreach programs	46%	91%	9%
Family Readiness Groups	64%	91%	9%
Relocation Readiness Program	73%	97%	3%
Family Advocacy Program	61%	75%	25%
Crisis intervention	42%	71%	29%
Money management classes, budgeting assistance	55%	89%	11%
Financial counseling, including tax assistance	60%	84%	16%
Consumer information	31%	88%	13%
Employment Readiness Program	57%	80%	20%
Foster child care	23%	75%	25%
Exceptional Family Member Program	60%	94%	6%
Army Family Team Building	59%	89%	11%
Army Family Action Plan	43%	93%	7%

* Percentage of Spouses of Active Duty Member users

ARMY COMMUNITY SERVICE: POSITIVE IMPACTS ON ACTIVE DUTY AND SPOUSES

Fort Belvoir

POSITIVE* ACS IMPACTS	ACTIVE DUTY	SPOUSES OF ACTIVE DUTY
Satisfaction with my job	40%	42%
Personal job performance/readiness	37%	42%
Unit cohesion and teamwork	49%	45%
Unit readiness	53%	54%
Relationship with my spouse	36%	40%
Relationship with my children	42%	34%
My family's adjustment to Army life	40%	55%
Family preparedness for deployments	51%	60%
Ability to manage my finances	37%	33%
Feeling that I am part of the military community	50%	60%

* Positive = moderate, great or very great extent

CHILD AND YOUTH SERVICES: POSITIVE IMPACTS ON ACTIVE DUTY AND SPOUSES

Fort Belvoir

POSITIVE* CYS IMPACTS	ACTIVE DUTY	SPOUSES OF ACTIVE DUTY
Helps minimize lost duty/work time due to lack of child care/youth sponsorship options	96%	100%
Helps minimize lost duty/work time due to lack of child care/youth services	87%	100%
Plays a role in influencing my decision/my spouse's decision to remain in the Army	82%	52%
Allows me to work outside my home	87%	67%
Allows me to work at home	80%	53%
Offers me an employment opportunity within the CYS program	100%	50%
Allows me/my spouse to better concentrate on my/our job(s)	86%	90%
Provides positive growth and development opportunities for my children	87%	96%

* Positive = moderate, great or very great extent

BETTER OPPORTUNITIES FOR SINGLE SOLDIERS

(BOSS):

Fort Belvoir

POSITIVE IMPACTS ON ACTIVE DUTY

POSITIVE* BOSS IMPACTS	ACTIVE DUTY
Satisfaction with my job	39%
Personal job performance/readiness	43%
Unit cohesion and teamwork	46%
Unit readiness	43%
Ability to manage my finances	32%
Feeling that I am part of the military community	44%
Relationship with my children (single parents)	31%
My family's adjustment to Army life (single parents)	36%
Family preparedness for deployments (single parents)	31%

* Positive = moderate, great or very great extent

LEISURE ACTIVITIES: PREFERENCES OVERALL AND BY PATRON GROUP

Fort Belvoir

Top 10 Leisure Activities for All Respondents

Watching TV, videotapes, and DVDs	78%
Entertaining guests at home	69%
Going to movie theaters	60%
Internet access/applications (home)	59%
Walking	54%
Special family events	47%
Plays/shows/concerts	46%
Cardiovascular equipment	43%
Gardening	43%
Attending sports events	41%

Top 5 for Spouses of Active Duty

Watching TV, videotapes, and DVDs	87%
Entertaining guests at home	79%
Going to movie theaters	76%
Internet access/applications (home)	71%
Walking	68%

Top 5 for Civilians

Watching TV, videotapes, and DVDs	64%
Entertaining guests at home	63%
Plays/shows/concerts	53%
Live entertainment	50%
Going to movie theaters	48%

Top 5 for Active Duty

Entertaining guests at home	66%
Watching TV, videotapes, and DVDs	63%
Internet access/applications (home)	63%
Going to movie theaters	47%
Digital Photography	44%

Top 5 for Retirees

Watching TV, videotapes, and DVDs	84%
Entertaining guests at home	69%
Walking	64%
Going to movie theaters	60%
Internet access/applications (home)	58%

LEISURE ACTIVITIES: PREFERENCES BY ACTIVITY CATEGORY

Fort Belvoir

Team Sports	
Softball	8%
Soccer	7%
Basketball	7%
Volleyball	4%
Self-directed sports tournaments	4%

Sports and Fitness	
Walking	54%
Cardiovascular equipment	43%
Weight/strength training	33%
Running/jogging	30%
Group exercise classes	19%

Outdoor Recreation	
Going to beaches/lakes	39%
Picnicking	28%
Bicycle riding/mountain biking	23%
Camping/hiking/backpacking	20%
Fishing	15%

Entertainment	
Watching TV,videotapes, and DVDs	78%
Going to movie theaters	60%
Plays/shows/concerts	46%
Attending sports events	41%
Festivals/events	34%

Social	
Entertaining guests at home	69%
Special family events	47%
Happy hour/social hour	36%
Dancing	29%
Night clubs/lounges	24%

Special Interests	
Internet access/applications (home)	59%
Gardening	43%
Digital photography	35%
Automotive detailing/washing	25%
Automotive maintenance & repair	23%

LEISURE ACTIVITIES: MARKET SHARE OF ACTIVITY PREFERENCES ON POST*

Fort Belvoir

ACTIVITIES	PARTICIPATED PRIMARILY ON POST	PARTICIPATED PRIMARILY OFF POST	OVERALL PARTICIPATION
Reading	23%	N/A	23%
Reference/research services	19%	N/A	19%
Internet access (library)	19%	N/A	19%
Study/self development	15%	N/A	15%
Multi-media (videos, DVDs, Cds)	15%	N/A	15%
Cardiovascular equipment	14%	29%	43%
Weight/strength training	11%	21%	33%

*Top 7 leisure activity preferences ranked by on-post participation.

LEISURE ACTIVITIES: MARKET SHARE OF SPECIAL INTEREST ACTIVITY PREFERENCES BY LOCATION*

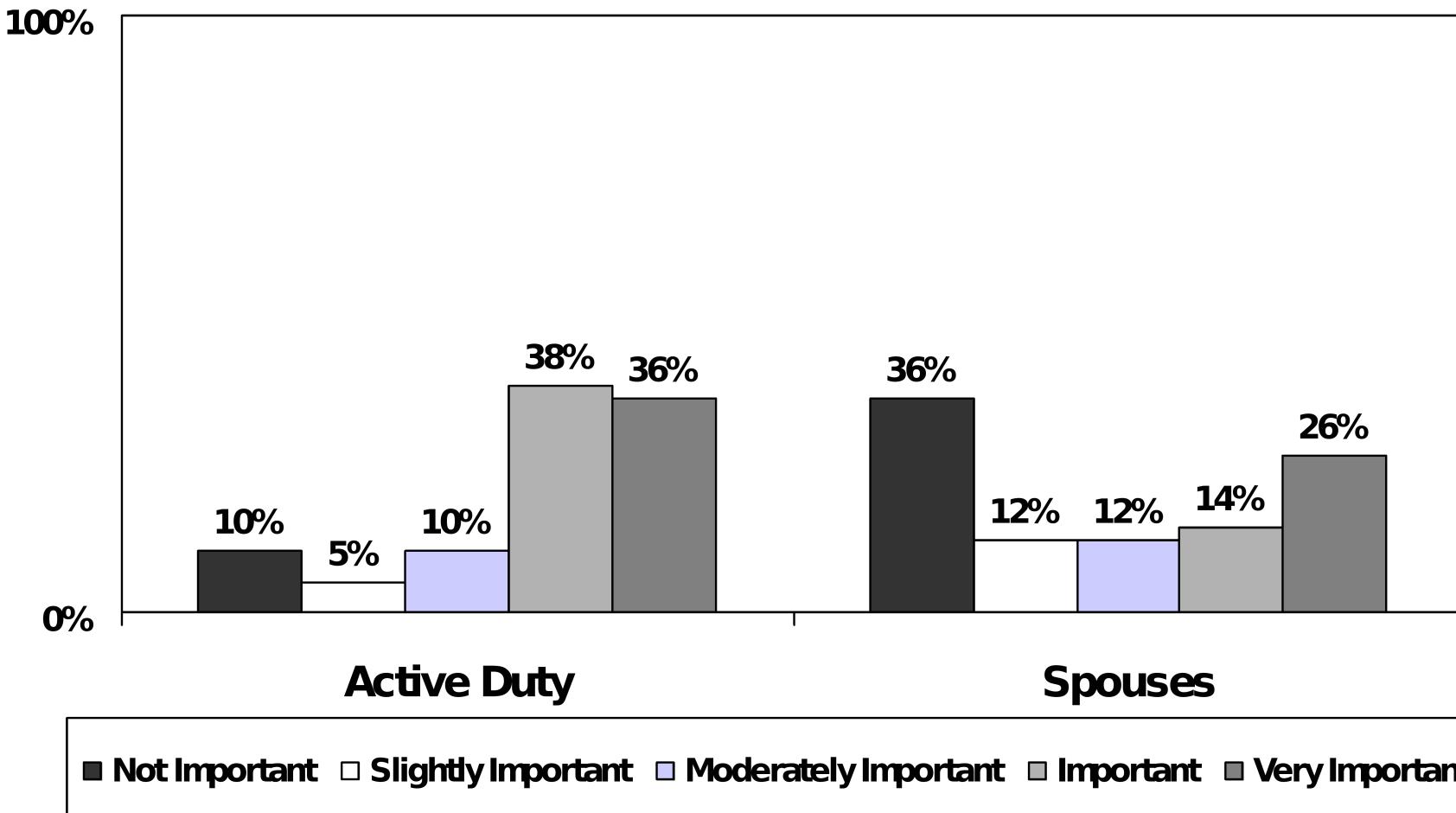
Fort Belvoir

ACTIVITIES	PARTICIPATED PRIMARILY ON POST	PARTICIPATED PRIMARILY OFF POST	PARTICIPATED PRIMARILY AT HOME	OVERALL PARTICIPATION
Internet access/applications (home)	3%	5%	51%	59%
Gardening	0%	1%	41%	43%
Digital photography	1%	7%	27%	35%
Automotive detailing/washing	3%	9%	13%	25%
Automotive maintenance & repair	7%	8%	8%	23%
Trips/touring	0%	23%	0%	23%
Computer games	0%	1%	19%	21%

*Top 7 special interest activity preferences ranked by overall participation.

DEPLOYMENT AND MWR: IMPORTANCE OF ACCESS TO MWR DURING DEPLOYMENT

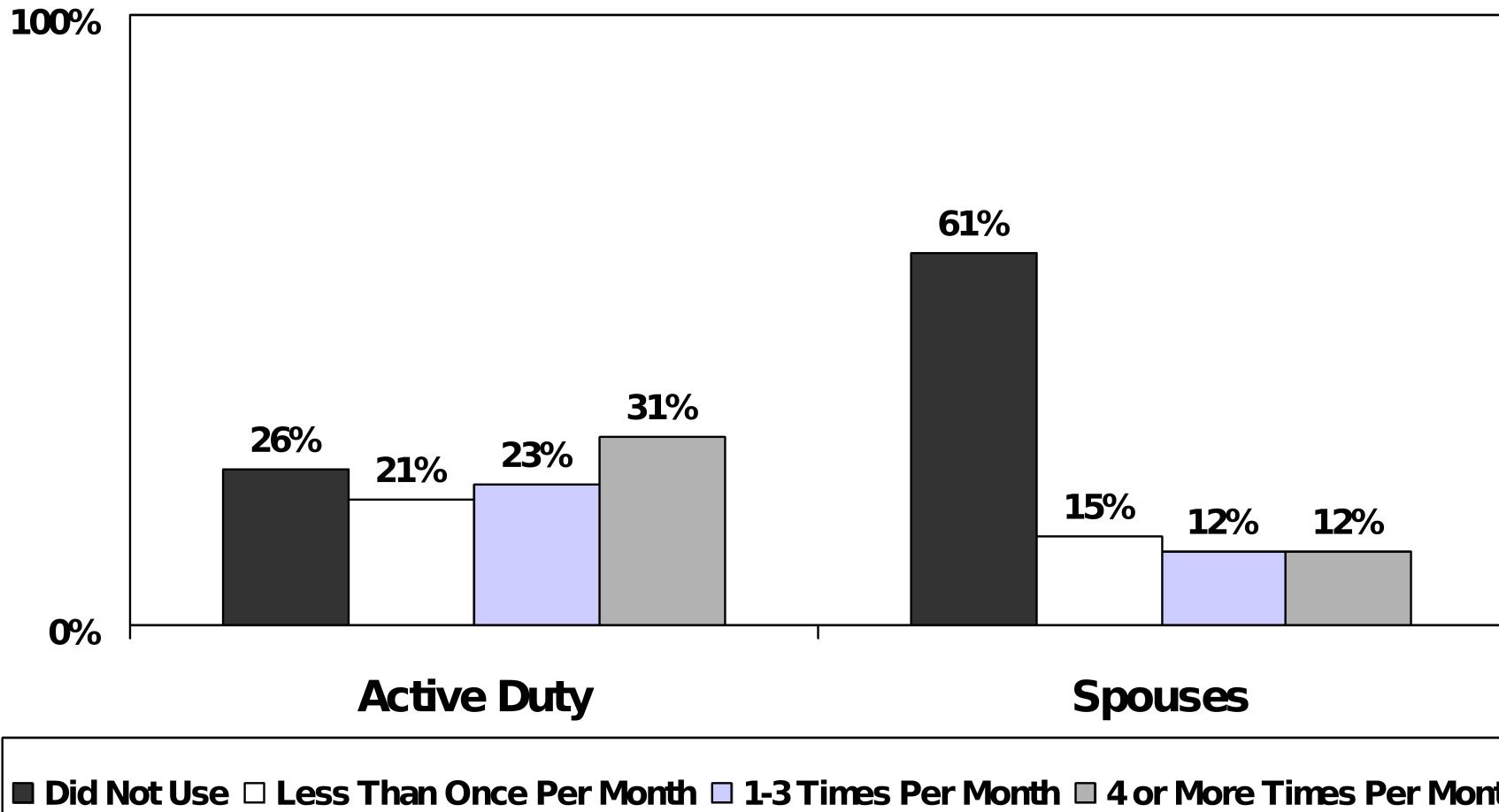
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DEPLOYMENT AND MWR: USE OF MWR DURING DEPLOYMENT IN THEATER OR AT HOME

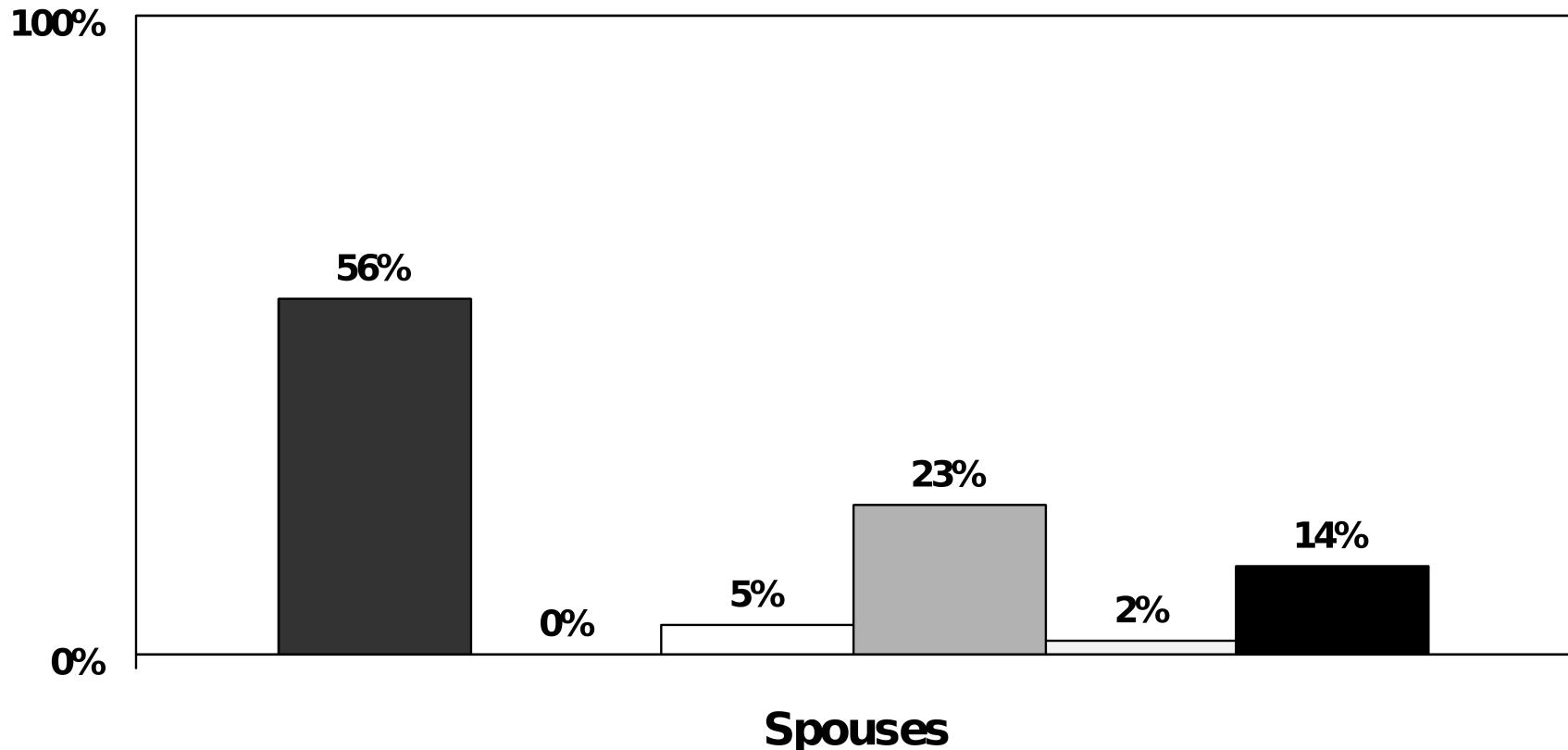
INSTALLATION

Fort Belvoir



DEPLOYMENT AND MWR: USE OF MWR DURING DEPLOYMENT COMPARED TO NON-DEPLOYMENT

Fort Belvoir



■ Did Not Use □ Much Less □ Somewhat Less □ About the Same □ Somewhat More ■ Much More

CAREER INTENTIONS: ACTIVE DUTY AND SPOUSES OF ACTIVE DUTY MEMBERS

Fort Belvoir

Current Plans About Making the Military Your Career	ACTIVE DUTY
Definitely will not make military a career	10%
Probably will not make military a career	8%
Undecided	17%
Probably will make military a career	13%
Definitely will make military a career	53%

Do You Want Your Spouse to Make the Military His/Her Career?	SPOUSES OF ACTIVE DUTY
No	4%
Not Sure	9%
Yes	87%

NEXT STEPS

Fort Belvoir

□ **INSTALLATION REPORTS**

- Review information on 91 leisure activities and up to 40 MWR facilities
- Share with Commander and program managers

□ **DATA APPLICATIONS**

- Action planning for program change and enhancement
- Strategic business planning
- Five year program planning
- Priorities for Project Validation Assessments
- Follow-up focus groups on items of interest or for clarification of findings
- Input into the Installation Status Report (ISR)